

Forecast Definition

Create Forecast Snapshot Each Week Active
Forecast Snapshot Day Sunday } -102

Next Forecast Series Dates
Forecast Date 11/23/2003 ~103

Forecast Series Participants
All 0-9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Previous | Next

Last Name	First Name
Phillips	Ethan
Rogers	Rick
Taylor	Ryan
Waller	Lisa
Williams	Joan

Number of records displayed: 25

Fig 1

200

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CRM OnDemand

Search

Contacts

Advanced Search

Submit

Create

Task

Appointment

Contact

Opportunity

Account

Lead

Service Request

Solution

Home

1

Calendar

Leads

Accounts

Contacts

Opportunities

Forecasts

Reports

Solutions

Service

CustomerCare Training Admin MySetup Deleted Items Help

Forecast Definition

Help Tutorial Back

Step 1

Step 2

Step 3

Select your Forecast Snapshot Frequency

Create Forecast Snapshot Each*

Week

* = Required Field

Next Cancel

Next Cancel

Fig. 2

Home Calendar Leads Accounts Contacts Opportunities Forecasts Reports Solutions Service Campaigns Dashboard Deleted Items

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201

202

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CRM OnDemand

CustomerCare Training Admin MySetup Deleted Items Help Sign

Home 1 Calendar Leads Accounts Opportunities Contacts Forecasts Reports Solutions Serv

Forecast Definition

Help Tutorial Back

Step 1

Step 2

Step 3

Advanced Search

- create
- ask
- appointment
- contact
- opportunity
- account
- lead
- service Request
- solution

301

Search your forecast Snapshot. Auto-filters by date.

Forecast Snapshot Day# Sunday

* = Required Field

302

301

Fig. 3

Home Calendar Leads Accounts Contacts Opportunities Forecasts Reports Solutions Service Campaigns Dashboard Deleted Items

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1111

Forecast Definition

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Step 1

Step 2

Step 3

Advanced Search

reate

45b.

Appointment

contact

Opportunity

accounteadService Request

Solution

Previous Finish Cancel

Previous Finish Cancel

Company Roles

Field Sales Rep
Service Manager
Service Rep

Forecasting Roles

**Executive
Sales & Marketing Manager
Inside Sales Rep
Administrator**

Select the Roles you wish to include in your Forecast. The users related to each role will be the Forecast participants

404 403

49

600

2601

2602

603

Forecast Detail

Help Tutorial Back

Created for: Joan Williams Create Date: 9/21/2003 Status: Active

Forecast Summary					
Forecast Summary					
Date	Quota	Closed Revenue	Quota %	Forecast	Expected Revenue
7/1/2003		\$3,450,000.00	0%	\$25,200,000.00	\$11,975,017.30
8/1/2003		\$2,350,000.00	0%	\$5,950,000.00	\$4,869,997.65
9/1/2003		\$2,000,000.00	0%	\$12,800,000.00	\$9,470,000.00
Totals	\$0.00	\$7,800,000.00		\$43,950,000.00	\$26,315,014.95

Team's Summary by Month

All 0-9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z											
Owner Alias											
Date	Quota %	Forecast	Closed Revenue	Best Case	Pipeline	Last Updated					
7/1/2003	0%	\$1,600,000.00	\$1,200,000.00	\$0.00	\$1,600,000.00	9/21/2003 11:23:38 PM					
8/1/2003	0%	\$2,400,000.00	\$800,000.00	\$0.00	\$2,400,000.00	9/21/2003 11:23:38 PM					
9/1/2003	0%	\$3,200,000.00	\$1,200,000.00	\$0.00	\$6,400,000.00	9/21/2003 11:23:38 PM					
7/1/2003	0%	\$21,600,000.00	\$1,050,000.00	\$0.00	\$29,500,000.00	9/21/2003 11:23:37 PM					
8/1/2003	0%	\$350,000.00	\$350,000.00	\$0.00	\$350,000.00	9/21/2003 11:23:37 PM					
Totals		\$34,750,000.00	\$4,600,000.00	\$0.00	\$45,850,000.00						

Show Full List

My Opportunities

All 0-9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z											
Close Date forecasted											
Close Date	Forecasted	Opportunity Name	Account Name	Revenue	Sales Stage	Previous Next					
9/3/2003	Y	Bay Construction - Std Order - 5 Phoenix 900	Bay Construction	\$400,000.00	6 - Closed/Won	Call					
9/3/2003	Y	Bay Demolition Services - Std Order - 5 Phoenix 900	Bay Demolition Services	\$400,000.00	7 - Closed/Lost	E-mail					
9/30/2003	Y	Bobcat Loaders & Excavators - Std Order - 5 Phoenix 900	Bobcat Loaders & Excavators	\$400,000.00	3 - Short List	None					
8/18/2003	Y	Carter's Rigging & Supply - Std Order - 5 Phoenix 900	Carter's Rigging & Supply	\$400,000.00	6 - Closed/Won	None					

Fig. 6

700

701

Fig 7

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Search

Contacts

Advanced Search

Submit

Create:

Task

Appointment

Contact

Opportunity

Account

Lead

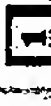
Service Request

Solution

CustomerCare Training Admin MySetup Deleted Items Help Sign Out



Home



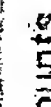
Calendar



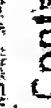
Leads



Accounts



Contacts



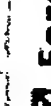
Opportunities



Forecasts



Reports



Solutions



Service

Forecast Edit

Forecast Summary

Save

Cancel

Refresh Totals

Forecast Date

Closed Revenue

Forecast

Best Case

Pipeline

Expected Revenue

7/1/2003

\$3,450,000.00

\$25,200,000.00

\$0.00

\$33,100,000.00

\$11,975,017.30

8/1/2003

\$2,350,000.00

\$5,950,000.00

\$0.00

\$5,950,000.00

\$4,869,997.65

9/1/2003

\$2,000,000.00

\$12,800,000.00

\$0.00

\$16,000,000.00

\$9,470,000.00

Totals

\$7,800,000.00

\$43,950,000.00

\$0.00

\$55,050,000.00

\$26,315,014.95

Home Calendar Leads Accounts Contacts Opportunities Forecasts Reports Solutions Service Campaigns Dashboard Deleted Items

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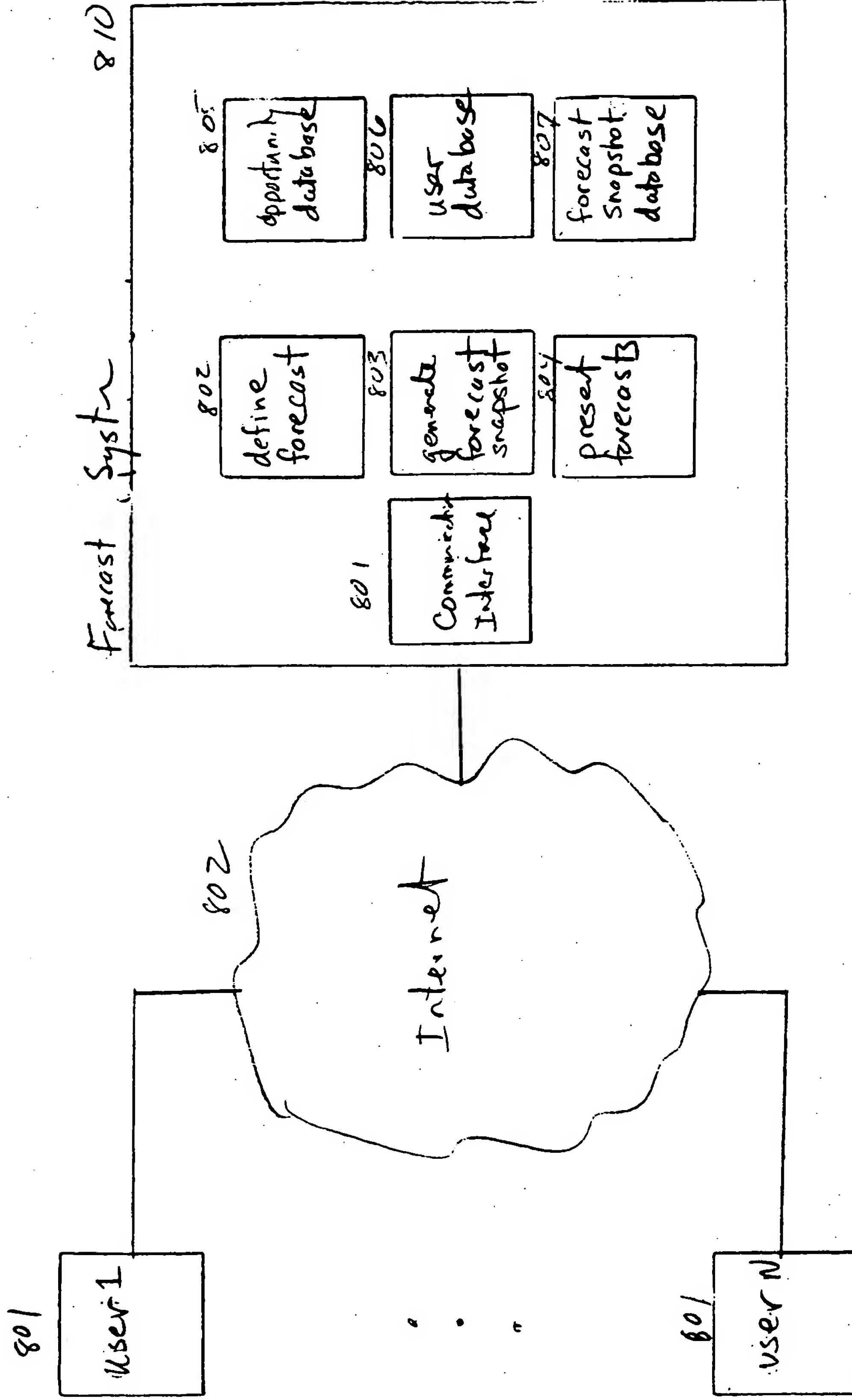


Fig 8

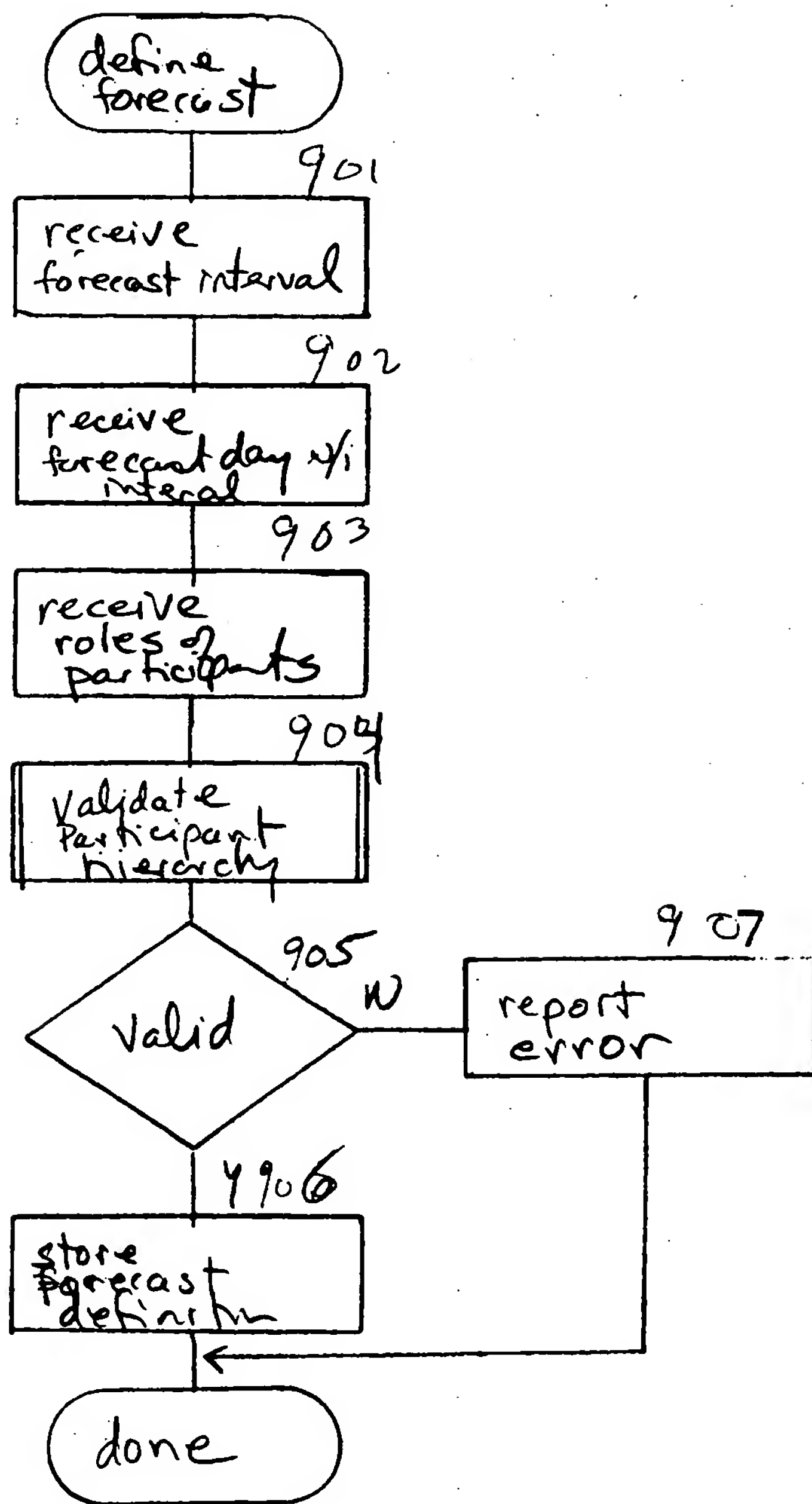


Fig 9

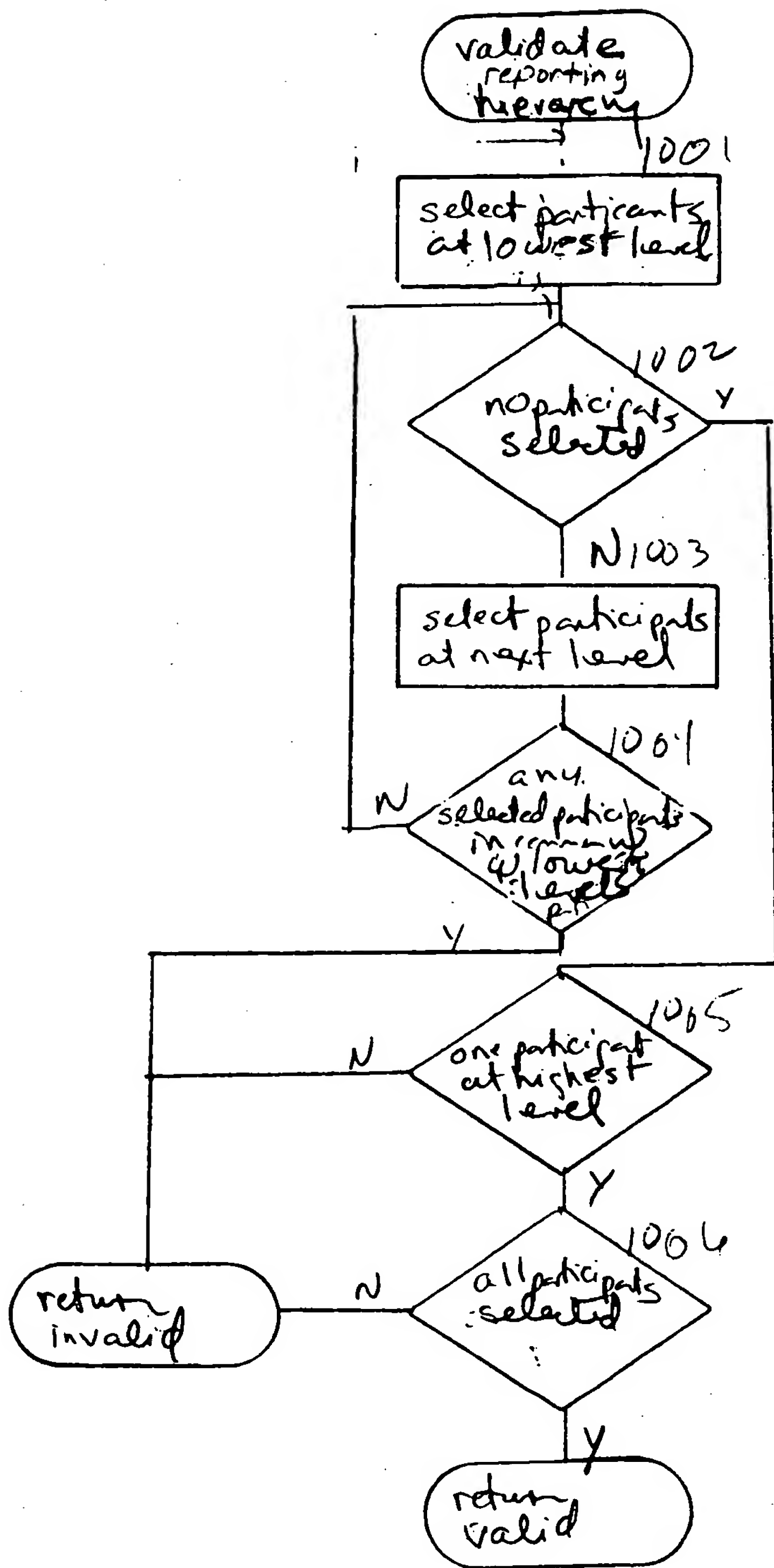


Fig 10

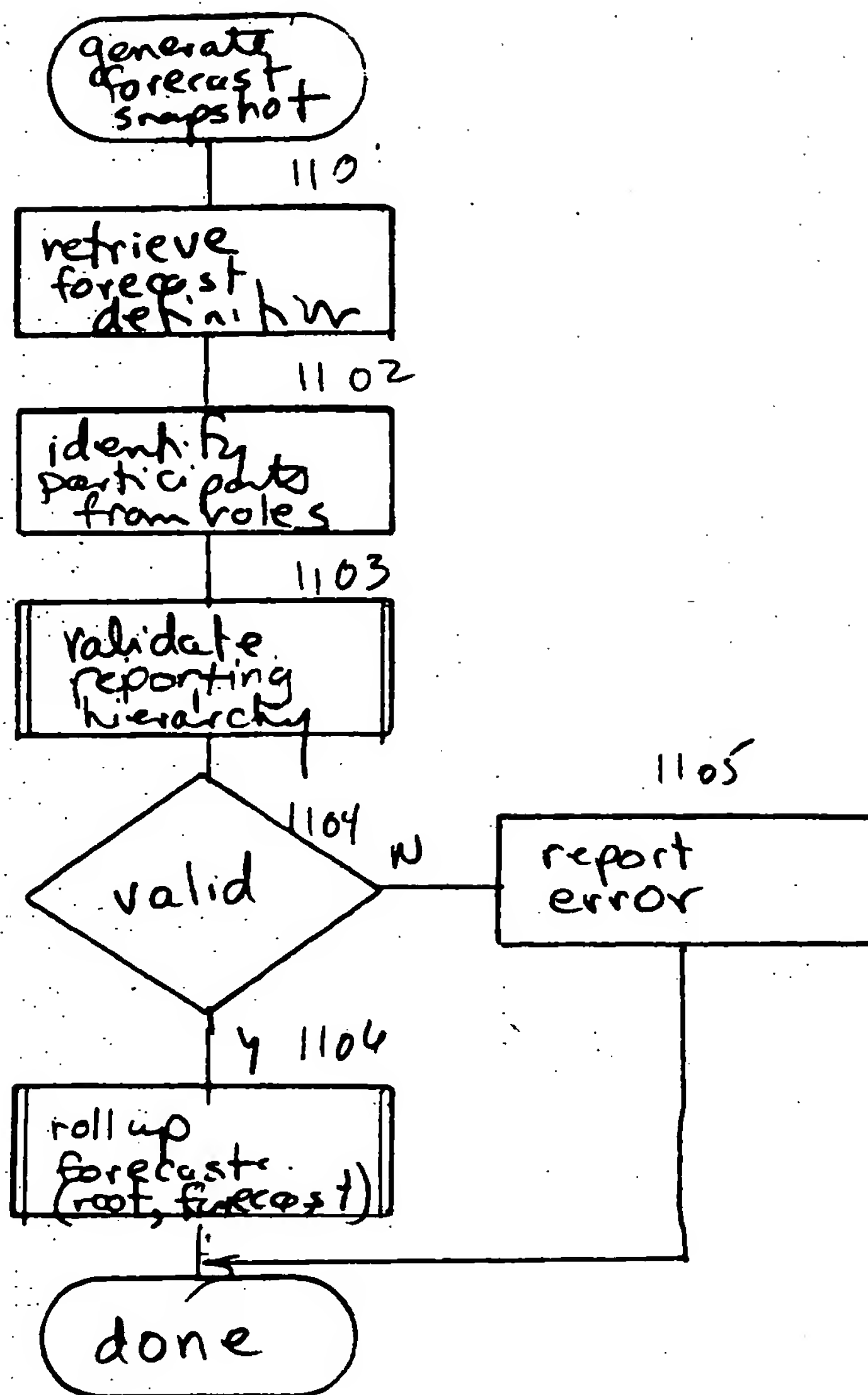


Fig 11

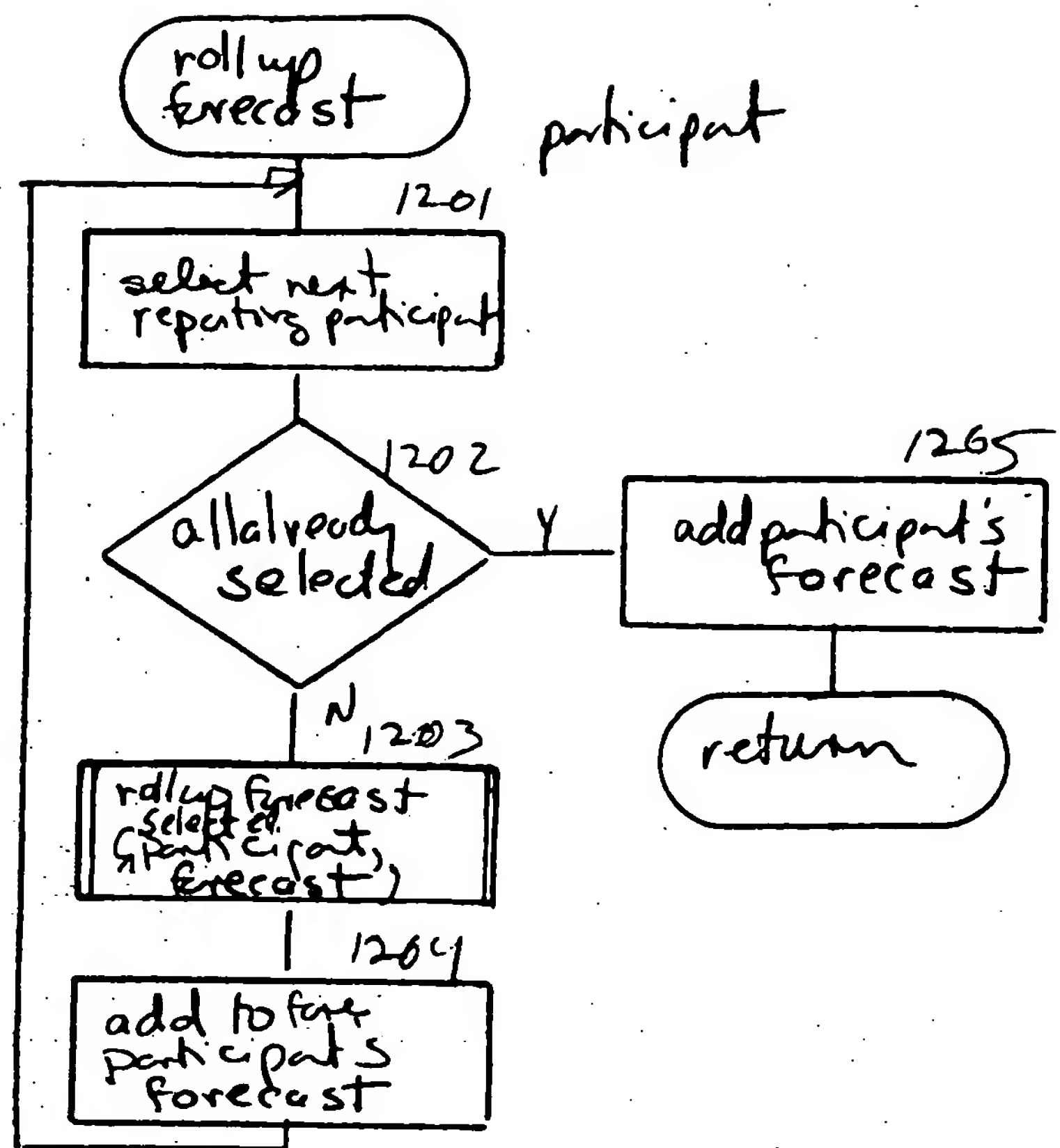


Fig 12

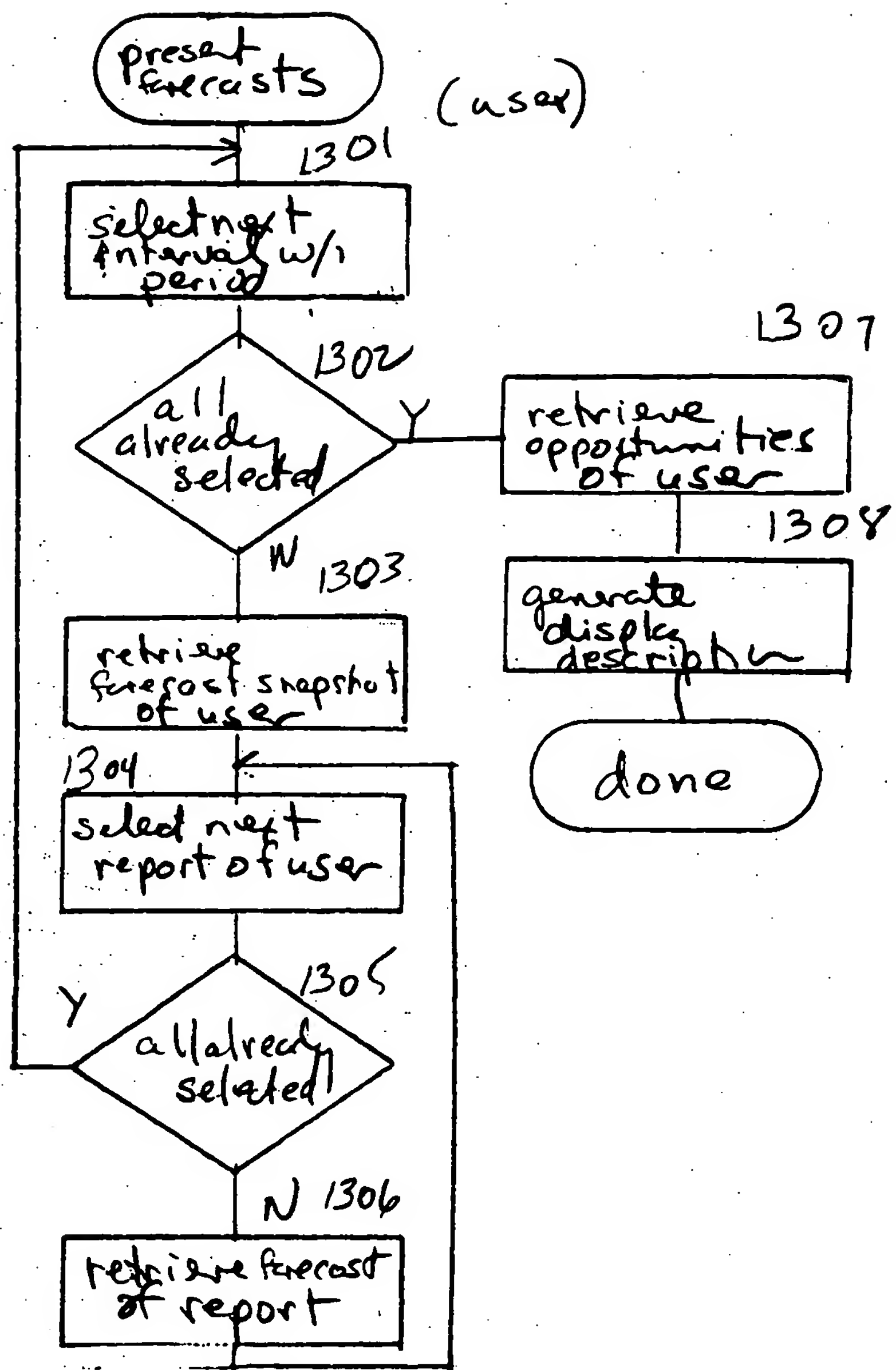


Fig 13